

SC Weatherization Assistance Program

Client File Checklist

Client's Name

DBA FACSpro Client ID#

	Form or Document	Yes	No	N/A	Incomplete
Intake Documents	DBA Application Customer Report - client signature				
	DBA Weatherization Application - client signature				
	Income Documentation				
	Social Security Card				
	Driver's License or Picture ID				
	Utility Bill (Electric)				
	Utility Bill (Non-Electric)				
	Proof of Age of Site-Built Dwelling - County Assessor's Office				
Forms	Form 100 Client Interview				
	Form 101 Homeowner and Fuel Release				
	Form 102 Mold & Moisture				
	Form 103A Lead Certified Renovator				
	Form 103B Lead Pamphlet				
	Form 104A Unvented Space Heater - Site-Built				
	Form 104B Unvented Space Heater - Mobile Home				
	Form 105 Weatherization Services Agreement				
	Form 106 SHPO Project Review				
	Form 107 Deferral				
	Form 200 Insulation Certificate				
	Form 300 SC Assessment Booklet				
	Form 301 Diagnostic Testing				
	Form 400 Client Review (Note: Agency may use a similar form.)				
	Form 500 QC Final Inspection				
	Form 600 Final Inspection Certification				
Audit	DBA IWC (Inspection/Assessment, Work Order, Cost Center)				
	DBA IWC Change Order				
	DBA Wx FACSPro - QC Checklist				
	NEAT / MHEA Recommended Measures Report				
	NEAT / MHEA Work Order				
	Vendor Invoice (Wx Contractor)				
	HVAC Contractor Invoice with itemized list of work done				
	HVAC contractor Manual J test				
	HVAC Warranty Information provided to client				
	RED Calc 62.2 (2016) final test				
	Photos pre-wx & post-wx uploaded to DBA Wx FACS Pro?				
	Client Education (identify):				
	Client Education (identify):				
	Other (identify):				

Agency Representative (print name)

Agency Representative (signature)

Date